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Report Highlights:

The situation in the cigarette industry in Poland is getting worse. Increased smuggling of cigarettes has resulted in lower demand for locally-produced cigarettes and locally grown tobacco. Thanks to a government's intervention program in 2001, Polish production of tobacco will be similar to 2000 and will be around 30,000 tons.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
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EXECUTIVE SUMMARY

Neither Polish tobacco growers nor cigarette manufacturers are optimistic about the current state of the tobacco industry in Poland, or its future. Smuggling of tobacco products continues to grow and is the main factor for the current recession. In 2000, smuggled cigarettes represented 15 percent of sales. Official sales of cigarettes were only 73 billion pieces compared with 88 billion in 1999.

As a result of the drop in cigarette production, tobacco manufacturers purchased less unmanufactured tobacco, both domestic and imported. In addition, farmers either curtailed their tobacco production or switched to other crops. Area of tobacco plantings decreased 33 percent - from 20,868 hectares in 1999 to 14,057 hectares in 2000.

Due to lower demand for officially sold cigarettes, producers purchased only 27,000 tons of local tobacco in 2000, a 32 percent decline from 1999. To prevent a collapse of local tobacco production, the government approved a one-year program for subsidizing purchases of 27,350 tons of tobacco, which will keep purchases unchanged in 2001 compared with 2000.

Imports of unprocessed tobacco were lower in 2000. Imports totaled 17,221 metric tons in 2000 compared with 48,825 metric tons in 1999. A similar downward trend is expected in 2001.

Exports of cigarettes almost doubled in 2000 and reached 7.7 billion pieces compared with 4.7 billion pieces in 1999. Imports continued to decline with 104 million pieces in 2000, compared with 548 million pieces in 1999. Imports are forecast to decrease in 2001. Exports are expected to increase up to 8 billion pieces.

TOBACCO

Production

Tobacco area declined by one-third, from 20,868 hectares in 1999 to 14,057 hectares in 2000. This was a result of decreased demand for tobacco, as a result of lower sales of cigarettes and increased smuggling. Smuggled cigarettes represented 15 percent of the Polish market last year. Specialists expect this trend of declining demand to continue in 2001. Cigarette manufacturers, however, have promised to contract for all locally produced tobacco in 2001.

The tobacco leaf harvest is expected to be 29,000 - 30,000 tons in 2001. Farmers are beginning to consider tobacco as a low profit crop. Many are switching to more profitable crops, like potatoes or grains.

Polish farmers still cultivate traditional varieties of dark tobacco. There is, however, a steady increase in production of lighter varieties. In southern Poland, one of the largest tobacco growing regions, most farmers have already switched to the new, lighter varieties. This shift may accelerate as the requirement expires for cigarette manufacturers to use a portion of domestic tobacco in their manufacturing process.

According to Polish privatization agreements, tobacco companies are required for at least 5 years to purchase 40 percent of domestically-produced tobacco. This period for some companies ended in 2000. However, in response to a new government program, the cigarette manufacturers promised to purchase 27-28 thousand tons of unmanufactured tobacco from local farmers in 2001. The government subsidizes each purchased kilogram of tobacco by PLN 2.3 (\$ 0.58). The program is approved for one year.

Tobacco is grown in Poland by approximately 30 thousand farmers. The average size of a typical tobacco farm is approximately 0.4 hectares. The largest tobacco growing areas are located in the south near Zamosc, Kielce and Krakow. The dominant varieties are Virginia (around 55 percent), Burley (around 38 percent) and dark tobacco like Skroniowski and Kentucky (5 percent).

At the end of 2000 Poland adopted new legislation encouraging local farmers of fruit, vegetables, hop, tobacco and dried feed to organize themselves into producers groups. Some of the resolutions related to the groups are already in force, others concerning subsidies will be implemented from January 1, 2002 or 2003.

Consumption

Domestic tobacco production covers about 50 percent of industry demand. Virginia and Burley are purchased by tobacco plants and used as filler for branded cigarettes. The remaining 50 percent of raw material is imported. These are mainly aromatic, oriental varieties which cannot be grown in Poland, due primarily to unfavorable climatic conditions and susceptibility to diseases.

A total of 27,000 tons of local tobacco was purchased by companies in 2000; a 32 percent drop from 1999. Purchases in 2001 are expected to be about the same, thanks to a government's intervention program. These purchases will be completed between September 1, 2001 and March 31, 2002. The amount of PLN 62.9 million (\$15.7 million) is expected in the Agricultural Markets Agency's budget for 2001/2002, including PLN 37.7 million (\$ 9.4 million) to be spent in 2001.

Stocks

There are no data on stocks for unmanufactured tobacco. Actually, stocks are privatized and no information is available. Even though cigarette manufacturers keep stocks for approximately 2-3 years, they intend to purchase locally grown tobacco this year. This most likely reflects the companies' concern with domestic politics and not their real need for tobacco.

Trade

As with local tobacco purchases, imports of raw tobacco in 2000 fell. Imports totaled 23,873 metric tons in 2000, compared to 48,825 metric tons for the same period in 1999. Imports of all varieties were much lower than in the previous year. Companies appear to have imported additional tobacco in 1999 out of concern that the Polish government would raise tobacco tariffs in 2000 from 30 percent to 180 percent. After strong pressure from both foreign and domestic interests including Polish tobacco farmers, the Polish government decided to leave tobacco import tariffs unchanged.

It is expected that in 2001 imports will not surpass 23-25,000 tons. Traditionally, imports consist primarily of light tobacco varieties. The main suppliers of unmanufactured tobacco to Poland are Brazil, Zimbabwe, the United States, Spain and Turkey. It is estimated that in 2001 exports will remain at about 5,000 tons. The biggest importers of Polish tobacco in 2000 were Kazakhstan, Ukraine, Russia and France.

Tariff changes and non-tariff barriers

Tariffs for unmanufactured tobacco have been largely unchanged since 1993 when a minimum tariff of 1.13 ECU per kilogram was introduced in addition to the basic ad valorem tariff. Tobacco is one of the few agricultural commodities which has the same tariffs for all suppliers. The following tariff schedule is applicable to unmanufactured tobacco in CY 2001:

Item	Description	Import duty (percent)
2401	Unmanufactured tobacco; Tobacco refuse (except partly stemmed Oriental)	30, minimum EUR 1.13 /kg
2401.20.60	- partly stemmed, Oriental	30, minimum EUR 0.75/kg

In CY 2001, Poland will maintain applied tariffs as noted in the preceding table which are much lower than WTO bound rates. According to bilateral agreements, tariff rate quotas in CY 2001 are available for:

Hungary	2401.10	Tobacco, non-processed	15 % min. 0.565 EUR/kg	700 tons
Bulgaria	2401.10	Tobacco, non-processed	15 % min. 0.565 EUR/kg	200 tons
Turkey	2401.10	Tobacco, non-processed	15 % min. 0.565 EUR/kg	1500 tons

Last year, the Customs Office decided that some imported tobacco was not properly classified resulting in a lower tax. Instead of a 230 percent tariff (for processed tobacco) only a 30 percent tax was levied. The Customs office proposed applying the higher tariffs retroactively, which would have resulted in large penalties. Importers

appealed to the World Customs Organization to resolve the dispute. In November 2000, the WCO resolved the dispute in favor of the importers and required Poland to use lower tariff on mixed tobacco.

Marketing

Polish tobacco is produced on private farms and sold to tobacco processing plants primarily on a contractual basis. Processing companies operate independently in all areas including foreign trade.

CIGARETTES

Production

Poland's cigarette production fell significantly to 73 billion pieces in 2000, compared to 94.6 billion pieces in 1999 and 96.5 billion pieces, in 1998. Other tobacco products, pipe tobacco or cigars, account for less than 0.1 percent of consumption and are mainly imported. The production and sale of snuff are prohibited. Market analysts suspect that such a decrease was a result of an increased smuggling of cigarettes, mainly from Poland's Eastern neighboring countries. If the situation continues in 2001, the legal sale of cigarettes will not reach 65 billion pieces.

Cigarettes are produced in 11 plants owned by independently-managed companies (mainly foreign). According to privatization agreements, the companies were required to modernize. To respond to a growing demand for light cigarettes with low tar and nicotine content, cigarette manufacturers have introduced modern production lines. In addition, using special tobacco funds, they provided technical assistance for farmers switching to new tobacco varieties. Beginning in 2002, tobacco growers will not be provided any financial support from the government. Anger and apprehension about the withdrawal of support is evident in the increasingly frequent protests.

Ninety-nine percent of cigarettes available on the Polish market are produced in Poland, of which 20 percent are cigarettes made under foreign brand licence and 80 percent are traditional Polish brands of which a large part of the tobacco is Polish.

Local cigarette producers' position on the market:

	1998	1999	2000
	%	%	%
Philip Morris	34	31.9	33.3
Reemtsma	24.4	22.6	19.29
BAT	11.5	10.3	14.57
House of Prince	8.7	14.1	13.36
Altadis (former Seita)	15.5	13.4	10.35
others	6.09	7.7	7.87
Imports			1.26

Since January 1, 2001, according to a new legislation, cigarette manufacturers need to obtain from the Ministry

of Agriculture a permit on their production instead of licence. The new act introduced also new requirements: cigarette manufacturer has to pay tobacco grower for purchased tobacco within 30 days or can lose the permit on its production for one year or longer.

Production policy

In June 2000, a new excise tax system on cigarettes was introduced. There is a per unit tax fixed for each quarter and equal for all brands of cigarettes, domestic or imported. There is an additional tax of 25 percent of the sales value in 2001. The 25 percent tax is applied to a maximum retail price which must be printed on the cigarette packaging which will be implemental after June 1, 2001. In addition, the excise tax cannot be lower than 90 percent of the excise tax for the most popular cigarettes sold during the previous year. In cases where no retail price is shown on the package, excise taxes of 70 and 230 percent will be applied to locally produced cigarettes and imported cigarettes, respectively. Most brands already have the price on their package. The categories and excise taxes are:

CN Code	Description	Excise tax in PLN per 1000 pcs and/or in percent applicable in the period of:	
		Jan 1 - Jan 16, 2001	from Jan 16, 2001
	Tobacco products:		
2402.20	cigarettes	PLN 42.00 + 25 % of retail price	PLN 50.00 + 25 % of retail price
2552.30	locally produced and imported cigars	PLN 123.00	
2402.10	other tobacco products	60 %	
2403.10.10.0	imported smoking tobacco, whether or not containing tobacco substitutes in any proportion, in packaging smaller than 500 g	150 %	

The new excise tax system was expected to generate over PLN 7.9 billion (\$2 billion) in tax revenues from cigarette production in 2000. Unfortunately, the State budget received only PLN 6.3 billion. The 2001 budget envisions revenues of PLN 8.5 billion from the excise tax on tobacco products. Most industry specialists estimate a maximum PLN 7 billion in revenues. The government is expected to review the law on excise tax in light of the smaller than expected revenues. There are three options: an increase of a per unit tax, an increase of percentage or return to the old excise tax system with four groups of cigarettes.

In November 2000, new regulations were adopted introducing more and more restrictive norms on cigarettes. The new regulations introduced different criteria for cigarettes locally produced and imported. According to the new regulations, locally manufactured cigarettes can contain 15 mg of tar and 1.5 mg of nicotine until November 15, 2001. After this date, the content of tar must decrease to 12 mg and nicotine to 1.2 mg. Stronger imported cigarettes can be sold on the market until May 15, 2001. After this date, only cigarettes with a lower

tar and nicotine content can be sold.

Consumption

There are about 10 million smokers in Poland of which 45 percent are men and 22 percent women. Per capita consumption is 2,500 cigarettes per year. Legal sales of cigarettes dropped in 2000 again by 15 billion pieces and represented 73 billion pieces, mainly due to smuggling. Smuggled cigarettes are 50 percent cheaper. It is estimated that 17 billion cigarettes were sold illegally on the Polish market last year. Specialists forecast a further increase of the share of smuggled cigarettes in sales and consumption. In 2001, it is forecast to reach 23.5 percent of legal sales which will be 73.6 billion pieces and 19 percent of consumption; in 2002, 23.3 billion cigarettes may be illegally sold in Poland, which would represent 35.2 percent of legal sales and 26 percent of consumption.

As a result of an annual anti-smoking campaign, over 2 million Poles are estimated to have given up smoking within the last ten years. At the same time, the amount spent by the health service on illnesses caused by tobacco-smoking has risen.

According to the Central Statistical Office, the expenditure on tobacco products accounts for 2 percent of an average Polish household budget. The average monthly expenditure per capita on tobacco products increased by 11 percent in 1999 (last available data) compared to 1998, while all household expenses increased by 9.3 percent.

Trade

Cigarette imports continue to decline due to increasing domestic production of Western brands in Poland. One hundred and four million pieces were imported in 2000 compared with 548 million pieces in 1999.

Polish exports of cigarettes almost doubled in 2000 and reached 7.7 billion pieces compared with 4.7 billion pieces in 1999. Tobacco farmers hope that cigarette exports will increase again in 2001, so that their production will be fully utilized. It is expected that exports of cigarettes will reach 8-9 billion pieces. The largest importers of Polish cigarettes in 2000 were Slovenia, Belgium, Moldova and Latvia.

Tariffs and non-tariff barriers

For CY 2000 tariffs and tariff rate quotas were established at the levels listed below.

CN Code	Description	Quota and Import Duty	Above quota tariffs
2402	Cigars and cigarettes:		
2402.10	Cigars	2.5 tons at 55 %	173 %, not less than EUR 19/1000 pcs
2402.20.10-90	Cigarettes	75 tons at 90 %, min EUR 9/1000 pcs	173 %, not less than EUR 19/1000 pcs
2402.90	Other	2.5 tons at 90 %	173 %, not less than EUR 19/1000 pcs
2403	Other mnfctrd, homogenized and reconstituted tobacco:	1,300 tons at:	
2403.10	pipe tobacco	120 %	230 %
2403.91	homogenized or reconstituted tobacco	55 %, min EUR 1.13/kg	230 %
2403.99.10	chewing and snuff tobacco	65 %	230 %
2403.99.90	other	55 %, min EUR 1.13/kg	230 %

The following quotas and tariff rates were established for 2001 with the Czech and Slovak Republics:

CN Code	Description	Quota and Import Duty
2402	Cigars, cigarettes and other manufactured, homogenized and reconstituted tobacco:	50 tons for each country
2402.10	Cigars	27.5 %
2402.20.10-90	Cigarettes	45 %, not less than EUR 4.5/1000 pcs
2402.90	Other	45 %
2403.10	pipe tobacco	60 %
2403.91	homogenized or reconstituted tobacco	27.5 %, not less than EUR 0.565/kg
2403.99.10	chewing and snuff tobacco	32.5 %
2403.99.90	other	27.5 %, not less than EUR 0.565/kg

Marketing

According to an amended act on health prevention against the results of tobacco smoking adopted in November 1999, tobacco companies must remove all advertising from newspaper kiosks, shops, cafeterias, restaurants, pubs and other public places. Additionally, all outdoor tobacco promotion or promotions through sponsorship is prohibited. Cigarettes cannot be sold in schools, health care institutions and sports halls. From January 2002 all forms of the tobacco products' advertisement will be prohibited in Poland. Only direct marketing and Internet advertising will be still permitted. Health warnings must cover one-third of all labels or advertisements for tobacco products, must be visible and easy to read. As a result of these restrictions on advertising and high cigarette prices, consumption remained unchanged.

Tobacco Unmfg. - PSD Table

PSD Table						
Country	Poland					
Commodity	Tobacco, Unmfg., Total				(HA)(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Area Planted	20868	18000	20300	14057	0	14000
Beginning Stocks	9899	9899	12699	23033	8899	18516
Farm Sales Weight Prod	42000	42000	38000	30000	0	30000
Dry Weight Production	37800	37800	34200	27000	0	27000
U.S. Leaf Imports	5000	5704	4000	2422	0	3000
Other Foreign Imports	45000	54584	37000	21451	0	25000
TOTAL Imports	50000	60288	41000	23873	0	28000
TOTAL SUPPLY	97699	107987	87899	73906	8899	73516
Exports	5000	4954	5000	4468	0	5000
Dom. Leaf Consumption	32000	32000	30000	27000	0	27000
U.S. Leaf Dom. Consum.	5000	5000	4000	2422	0	3000
Other Foreign Consump.	43000	43000	40000	21500	0	25000
TOTAL Dom. Consumption	80000	80000	74000	50922	0	55000
TOTAL Disappearance	85000	84954	79000	55390	0	60000
Ending Stocks	12699	23033	8899	18516	0	13516
TOTAL DISTRIBUTION	97699	107987	87899	73906	0	73516

Tobacco Unmfg - Exports

Export Trade Matrix			
Country	Poland		
Commodity	Tobacco, Unmfg., Total		
Time period	Jan-Dec	Units:	MT
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
Khazakhstan	1,202	Kazakhstan	1185
Ukraine	1,076	Ukraine	1133
Lithuania	835	Russia	963
France	657	France	614
Russia	522	Germany	460
Germany	344	Lithuania	92
Netherlands	140	Roumania	18
Czech Rep.	80		
UK	56		
Total for Others	4912		4465
Others not Listed	42		3
Grand Total	4954		4468

Tobacco Unmfg - Imports

Import Trade Matrix			
Country	Poland		
Commodity	Tobacco, Unmfg., Total		
Time period	Jan-Dec	Units:	MT
Imports for:	1999		2000
U.S.	5704	U.S.	2422
Others		Others	
Zimbabwe	11828	Brazil	4555
Brazil	10833	Zimbabwe	3452
Malawi	5177	Spain	2230
Turkey	4931	Turkey	2127
Italy	4236	Italy	1589
India	3559	India	1423
Greece	3359	Greece	962
China	1529	France	460
Tanzania	1182	Philippines	381
Argentina	1117	Thailand	270
Total for Others	47751		17449
Others not Listed	6833		4002
Grand Total	60288		23873

Tobacco Unmfg., Burley - PSD Table

PSD Table						
Country	Poland					
Commodity	Tobacco, Unmfg., Burley				(HA)(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Area Planted	5400	5400	5300	5000	0	5000
Beginning Stocks	4919	4919	5769	6267	6509	6443
Farm Sales Weight Prod	13000	13000	12000	12900	0	12900
Dry Weight Production	11700	11700	10800	11600	0	11600
U.S. Leaf Imports	28	480	25	886	0	800
Other Foreign Imports	5000	9155	4000	3117	0	4500
TOTAL Imports	5028	9635	4025	4003	0	5300
TOTAL SUPPLY	21647	26254	20594	21870	6509	23343
Exports	50	7	60	41	0	50
Dom. Leaf Consumption	11000	11000	10000	11500	0	11500
U.S. Leaf Dom. Consum.	28	480	25	886	0	800
Other Foreign Consump.	4800	8500	4000	3000	0	4500
TOTAL Dom. Consumption	15828	19980	14025	15386	0	16800
TOTAL Disappearance	15878	19987	14085	15427	0	16850
Ending Stocks	5769	6267	6509	6443	0	6493
TOTAL DISTRIBUTION	21647	26254	20594	21870	0	23343

Tobacco, Unmfg., Burley - Exports

Export Trade Matrix			
Country	Poland		
Commodity	Tobacco, Unmfg., Burley		
Time period	Jan-Dec	Units:	MT
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
Germany	4	Lithuania	35
Russia	2	Switzerland	5
Total for Others	6		40
Others not Listed	1		1
Grand Total	7		41

Tobacco, Unmfg., Burley - Imports

Import Trade Matrix			
Country	Poland		
Commodity	Tobacco, Unmfg., Burley		
Time period	Jan-Dec	Units:	MT
Imports for:	1999		2000
U.S.	480	U.S.	886
Others		Others	
Malawi	4318	Malawi	967
Brazil	1540	Brazil	636
Italy	854	Thailand	376
Argentina	353	Phillippines	220
Thailand	316	Italy	215
India	311	France	162
Phillipines	306	India	233
France	258	Argentina	88
Guatemala	176	Germany	73
Total for Others	8432		2838
Others not Listed	723		279
Grand Total	9635		4003

Tobacco Unmfg.,Dark Fire Cured - PSD Table

PSD Table						
Country	Poland					
Commodity	Unmfg., Dark Fire Cured				(HA)(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Area Planted	1000	1000	1000	1000	0	900
Beginning Stocks	2279	2279	2179	2708	2229	2950
Farm Sales Weight Prod	2500	2500	2500	2500	0	2300
Dry Weight Production	2250	2250	2250	2250	0	2000
U.S. Leaf Imports	0	0	0	2	0	10
Other Foreign Imports	900	1493	700	329	0	800
TOTAL Imports	900	1493	700	331	0	810
TOTAL SUPPLY	5429	6022	5129	5289	2229	5760
Exports	100	64	200	8	0	70
Dom. Leaf Consumption	2250	2250	2000	2000	0	1900
U.S. Leaf Dom. Consum.	0	0	0	2	0	10
Other Foreign Consump.	900	1000	700	329	0	800
TOTAL Dom. Consumption	3150	3250	2700	2331	0	2710
TOTAL Disappearance	3250	3314	2900	2339	0	2780
Ending Stocks	2179	2708	2229	2950	0	2980
TOTAL DISTRIBUTION	5429	6022	5129	5289	0	5760

Tobacco Unmfg., Dark Fire Cured - Exports

Export Trade Matrix			
Country	Poland		
Commodity	Unmfg., Dark Fire Cured		
Time period	Jan-Dec	Units:	MT
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
Ukraine	63	Germany	8
Germany	1		
Total for Others	64		8
Others not Listed			
Grand Total	64		8

Tobacco Unmfg., Dark Fire Cured - Imports

Import Trade Matrix			
Country	Poland		
Commodity	Unmfg., Dark Fire Cured		
Time period	Jan-Dec	Units:	MT
Imports for:	1999		2000
U.S.		U.S.	2
Others		Others	
Tanzania	927	Tanzania	262
India	248	India	22
Italy	94	Uganda	13
Indonesia	62	Indonesia	18
Malawi	36	Mexico	11
Brazil	18	Colombia	2
Mexico	4	Italy	1
Total for Others	1389		329
Others not Listed	104		0
Grand Total	1493		331

Tobacco Unmfg., Dark Air & Sun Cured - PSD Table

PSD Table						
Country	Poland					
Commodity	Unmfg.,Dark Air & Sun Cured				(HA)(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Area Planted	110	110	100	100	0	80
Beginning Stocks	227	227	137	4210	87	3971
Farm Sales Weight Prod	250	250	200	200	0	390
Dry Weight Production	248	248	180	180	0	350
U.S. Leaf Imports	0	0	0	0	0	0
Other Foreign Imports	447	9147	100	3895	0	3500
TOTAL Imports	447	9147	100	3895	0	3500
TOTAL SUPPLY	922	9622	417	8285	87	7821
Exports	90	164	50	239	0	300
Dom. Leaf Consumption	248	248	180	180	0	350
U.S. Leaf Dom. Consum.	0	0	0	0	0	0
Other Foreign Consump.	447	5000	100	3895	0	3500
TOTAL Dom. Consumption	695	5248	280	4075	0	3850
TOTAL Disappearance	785	5412	330	4314	0	4150
Ending Stocks	137	4210	87	3971	0	3671
TOTAL DISTRIBUTION	922	9622	417	8285	0	7821

Tobacco Unmfg., Dark Air & Sun Cured - Exports

Export Trade Matrix			
Country	Poland		
Commodity	Unmfg.,Dark Air & Sun Cured		
Time period	Jan-Dec	Units:	MT
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
Ukraine	164	Ukraine	239
Total for Others	164		239
Others not Listed			
Grand Total	164		239

Tobacco Unmfg., Dark Air & Sun Cured - Imports

Import Trade Matrix			
Country	Poland		
Commodity	Unmfg.,Dark Air & Sun Cured		
Time period	Jan-Dec	Units:	MT
Imports for:	1999		2000
U.S.		U.S.	
Others		Others	
Turkey	4801	Turkey	2061
Greece	2678	Greece	928
Bulgaria	698	Bulgaria	307
Italy	362	Italy	223
Macedonia	235	Macedonia	124
Liban	99	Lebanon	40
Iran	58	Monaco	33
Albania	51	Tokelau	31
Malawi	49	Iran	23
Total for Others	9031		3770
Others not Listed	116		125
Grand Total	9147		3895

Tobacco,Unmfg.,Flue Cured - PSD Table

PSD Table						
Country	Poland					
Commodity	Tobacco,Unmfg., Flue Cured				(HA)(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Area Planted	12800	12800	12600	12600	0	12000
Beginning Stocks	3398	3398	4217	6241	3717	4342
Farm Sales Weight Prod	27000	27000	25000	25000	0	23000
Dry Weight Production	24300	24300	22500	22500	0	20700
U.S. Leaf Imports	4000	4140	4000	830	0	2000
Other Foreign Imports	19026	21417	12500	8217	0	10000
TOTAL Imports	23026	25557	16500	9047	0	12000
TOTAL SUPPLY	50724	53255	43217	37788	3717	37042
Exports	2507	2874	3000	3399	0	3000
Dom. Leaf Consumption	21000	21000	20000	21000	0	18500
U.S. Leaf Dom. Consum.	4000	4140	4000	830	0	2000
Other Foreign Consump.	19000	19000	12500	8217	0	10000
TOTAL Dom. Consumption	44000	44140	36500	30047	0	30500
TOTAL Disappearance	46507	47014	39500	33446	0	33500
Ending Stocks	4217	6241	3717	4342	0	3542
TOTAL DISTRIBUTION	50724	53255	43217	37788	0	37042

Tobacco,Unmfg.,Flue Cured - Exports

Export Trade Matrix			
Country	Poland		
Commodity	Tobacco,Unmfg.,Flue Cured		
Time period	Jan-Dec	Units:	MT
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
Kazakhstan	844	Kazakhstan	1163
Ukraine	771	Russia	963
Lithuania	440	Ukraine	875
Russia	374	Germany	66
Germany	187	Lithuania	56
Netherland	140	Roumania	18
Czech Rep.	80		
UK	38		
Total for Others	2874		3141
Others not Listed			258
Grand Total	2874		3399

Tobacco,Unmfg.,Flue Cured - Imports

Import Trade Matrix			
Country	Poland		
Commodity	Tobacco,Unmfg.,Flue Cured		
Time period	Jan-Dec	Units:	MT
Imports for:	1999		2000
U.S.	4140	U.S.	830
Others		Others	
Zimbabwe	9106	Brazil	2912
Brazil	6016	Zimbabwe	2563
India	2367	India	845
Italy	757	France	282
Argentina	558	Italy	259
Greece	481	Spain	258
France	366	Argentina	238
Tanzania	232	Phillippines	221
Phillippines	230	Zambia	134
Zambia	221	Canada	70
Total for Others	20334		7782
Others not Listed	1083		435
Grand Total	25557		9047

Tobacco Unmfg., Light Air Cured - PSD Table

PSD Table						
Country	Poland					
Commodity	Unmfg., Light Air Cured				(HA)(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Area Planted	5400	5400	5300	7000	0	7000
Beginning Stocks	4919	4919	6801	6780	8301	7772
Farm Sales Weight Prod	13000	13000	12000	15000	0	10500
Dry Weight Production	11700	11700	10800	13500	0	13500
U.S. Leaf Imports	267	480	150	886	0	900
Other Foreign Imports	7845	9800	4000	3330	0	5000
TOTAL Imports	8112	10280	4150	4216	0	5900
TOTAL SUPPLY	24731	26899	21751	24496	8301	27172
Exports	200	139	300	44	0	150
Dom. Leaf Consumption	11000	11000	9000	12500	0	13000
U.S. Leaf Dom. Consum.	230	480	150	880	0	900
Other Foreign Consump.	6500	8500	4000	3300	0	5000
TOTAL Dom. Consumption	17730	19980	13150	16680	0	18900
TOTAL Disappearance	17930	20119	13450	16724	0	19050
Ending Stocks	6801	6780	8301	7772	0	8122
TOTAL DISTRIBUTION	24731	26899	21751	24496	0	27172

Tobacco Unmfg., Light Air Cured - Exports

Export Trade Matrix			
Country	Poland		
Commodity	Unmfg., Light Air Cured		
Time period	Jan-Dec	Units:	MT
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
Russia	68	Lithuania	35
Lithuania	66	Switzerland	5
Germany	4	Germany	3
Total for Others	138		43
Others not Listed	1		1
Grand Total	139		44

Tobacco Unmfg., Light Air Cured - Imports

Import Trade Matrix			
Country	Poland		
Commodity	Unmfg., Light Air Cured		
Time period	Jan-Dec	Units:	MT
Imports for:	1999		2000
U.S.	480	U.S.	886
Others		Others	
Malawi	4318	Malawi	967
Brazil	1562	Brazil	658
Italy	854	Thailand	376
India	610	Phillippines	220
Argentina	353	India	326
France	332	Italy	215
Thailand	316	France	162
Phillipines	306	Indonesia	94
Indonesia	226	Argentina	88
Total for Others	8877		3106
Others not Listed	923		224
Grand Total	10280		4216

Tobacco Unmfg., Oriental - PSD Table

PSD Table						
Country	Poland					
Commodity	Tobacco, Unmfg., Oriental				(HA)(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Area Planted	0	0	0	0	0	0
Beginning Stocks	1438	1438	1818	2421	1768	2277
Farm Sales Weight Prod	0	0	0	0	0	0
Dry Weight Production	0	0	0	0	0	0
U.S. Leaf Imports	0	0	0	0	0	0
Other Foreign Imports	7400	9147	3500	3895	0	6000
TOTAL Imports	7400	9147	3500	3895	0	6000
TOTAL SUPPLY	8838	10585	5318	6316	1768	8277
Exports	20	164	50	239	0	250
Dom. Leaf Consumption	0	0	0	0	0	0
U.S. Leaf Dom. Consum.	0	0	0	0	0	0
Other Foreign Consump.	7000	8000	3500	3800	0	5500
TOTAL Dom. Consumption	7000	8000	3500	3800	0	5500
TOTAL Disappearance	7020	8164	3550	4039	0	5750
Ending Stocks	1818	2421	1768	2277	0	2527
TOTAL DISTRIBUTION	8838	10585	5318	6316	0	8277

Tobacco Unmfg., Oriental - Exports

Export Trade Matrix			
Country	Poland		
Commodity	Tobacco, Unmfg., Oriental		
Time period	Jan-Dec	Units:	MT
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
Ukraine	164	Ukraine	239
Total for Others	164		239
Others not Listed			
Grand Total	164		239

Tobacco Unmfg., Oriental - Imports

Import Trade Matrix			
Country	Poland		
Commodity	Tobacco, Unmfg., Oriental		
Time period	Jan-Dec	Units:	MT
Imports for:	1999		2000
U.S.		U.S.	
Others		Others	
Turkey	4801	Turkey	2061
Greece	2678	Greece	928
Bulgaria	698	Bulgaria	307
Italy	362	Italy	223
Macedonia	253	Macedonia	124
Liban	99	China	93
Iran	58	Lebanon	40
Albania	51	Monaco	33
Malawi	49	Tokelau	31
		Iran	23
Total for Others	9049		3863
Others not Listed	98		32
Grand Total	9147		3895

Tobacco, Mfg., Cigarettes - PSD Table

PSD Table						
Country	Poland					
Commodity	Tobacco, Mfg., Cigarettes				(MIL PCS)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Filter Production	86100	86100	85000	67460	0	66000
Non-Filter Production	8500	8500	7000	5540	0	4000
TOTAL Production	94600	94600	92000	73000	0	70000
Imports	457	548	450	104	0	100
TOTAL SUPPLY	95057	95148	92450	73104	0	70100
Exports	4748	4748	5500	7716	0	8000
Domestic Consumption	90309	90400	86950	65388	0	62100
TOTAL DISTRIBUTION	95057	95148	92450	73104	0	70100

Tobacco, Mfg., Cigarettes - Exports

Export Trade Matrix			
Country	Poland		
Commodity	Tobacco, Mfg., Cigarettes		
Time period	Jan-Dec	Units:	MIL PCS
Exports for:	1999		2000
U.S.	0.009	U.S.	
Others		Others	
Slovenia	1721	Slovenia	2411
Belgium	1251	Belgium	1077
Latvia	592	Moldova	999
Russia	392	Latvia	781
Ukraine	240	Russia	453
Moldova	202	Ghana	395
Turkey	136	Djibuti	339
UAE	52	Mauretania	319
Jugoslavia	22	France	197
Germany	17	Panama	164
Total for Others	4625		7135
Others not Listed	123		581
Grand Total	4748.009		7716

Tobacco, Mfg., Cigarettes - Imports

Import Trade Matrix			
Country	Poland		
Commodity	Tobacco, Mfg., Cigarettes		
Time period	Jan-Dec	Units:	MIL PCS
Imports for:	1999		2000
U.S.	134	U.S.	84
Others		Others	
UK	266	UK	15
Germany	143	Germany	3
Russia	5	Czech Rep.	2
Total for Others	414		20
Others not Listed	0		0
Grand Total	548		104